SYSTEM ADMINISTRATOR'S GUIDE

Introduction

This document is a Quick Reference for the System Administrator. Each section can be reproduced and distributed as needed, but is not meant to be a resource for the end-user. DOS, WINDOWS and ES&H Management Plan Information System (ESH/Plan) expertise will be necessary before some of these activities can be performed.

In addition to the individual sections of this Guide, you can obtain further instruction in the use of ESH/Plan from the following documents. The documents are produced in Microsoft® Word and are available at the following Cycla web site: http://www.cycla.com/software/papers.htm.

- "Inside the CYCLAFOX.INI File" covers all system-level configuration options that can be set by System Administrators.

- "Managing Multiple Datasets" provides extensive detail on how to use multiple datasets within a Cycla software application. Motivating examples are provided.

- "CYCLA Exception Reporting Technology" covers the architecture of the Exception Report and shows a System Administrator how to extend this report to include additional, administrator-defined ESH/Plan rules; or to exclude certain pre-defined rules.

- "Batch Output Definitions and the Manager's Menu" provides detail beyond that available in the User's Manual for creating batch output definitions that can be run directly from the Manager's Menu.

- "Tracking Database Changes" covers an advanced administration module available to specify certain fields for which you wish to track all historical changes.

- "Database Management and Reporting Guidelines" provides general guidelines on the use of the Information System for meeting reporting requirements and simple problem-solving tips for the System Administrator.

QUICK START OF ESH/Plan

1. Go to the DOE ES&H Management Plan Information System web page at:

    http://tis-nt.eh.doe.gov/bps/eshplan/software.htm

2. Download the software:

    a. NEW: Download the latest Windows version for first-time installation.
    b. UPDATE: Download the update file to update to the current revision.

3. Next, install *and* start the software.

4. Respond to the prompts on the screen.

    a. Enter the drive and directory where you wish to install the software.

    b. For a new installation on your computer, choose "Full Installation."

5. At the login screen, enter the User ID for the System Administrator (SA):

    > **SA1**

    and also enter the initial SA Password:
    > **SA1**.

6. The System will display the Main menu for the System.

7. *Always* Exit by selecting the **Exit** option from the File menu.

Note: YOU MUST INSTALL AND RUN THE RELEASE VERSION OF THE SOFTWARE BEFORE YOU CAN INSTALL THE UPGRADE.

8. Install the update. You must select the same drive and directory in which the ESH/Plan software currently resides.

9. After installing the update, start ESH/Plan again, using the same User ID and Password and respond "Yes" to the automatic update message.

UPDATE OF ESH/Plan

Introduction

The main ESH/Plan System software must be installed as outlined in the Quick Start of ESH/Plan section of this Guide.

Recommended Steps when Updating ESH/Plan

CAUTION

Installing and updating to a new software revision is the time when your data faces the *highest* exposure to hardware and software failures.

Before attempting an installation and update, be sure you have a completely current backup of your database. *If you are using multiple datasets, you must back up each important dataset separately.*

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1. Run the **Backup** option from the Maintenance sub-menu (accessible from the File menu) to backup your entire dataset. Label the diskettes with the system name, date of backup, and old software revision number. Switch the write protection tabs on the diskettes to prevent these diskettes from being overwritten. Store the diskettes *permanently* in a safe place.

2. Quit ESH/Plan.

3. Install the new revision. Select the option "Full Installation." Follow the prompts.

4. The README.TXT file often has additional information that is important when updating to a new revision of the software. You should always review this file after installing a new revision and before starting ESH/Plan and running the update routine. You can review README.TXT using any text editor or word processor.

5. Following completion of the update, verify that the proper *new* revision number is reported in the System Information window.

6. Store the software installation diskettes *permanently* in a safe place, first verifying that the write protection tabs are set to disable diskette writes. In certain circumstances, these diskettes may be needed in the future to recover from hardware or software failures.

Network and Advanced Usage Considerations

1. All users must be logged out of ESH/Plan prior to attempting a new installation. An effective procedure for ensuring this is to delete the main `.EXE` file from the previous revision. (If any user is logged-in, the network will not allow this deletion.) Deleting the executable file ensures that no user can log in until your new installation is complete.

    The SA can also "lock out" (*i.e.*, prevent) further logins for a one hour period. Users who are already logged-in will see a message requesting that they log out soon. This message does not appear immediately; rather, its appearance is dependent on the tasks the user is performing. The SA can perform the lock out function from the Display Logged-in Users window, accessible from the Users sub-menu.

2. On any system with more than one user, you should also backup the user privilege information in the file `USERPRIV.DBF` by copying this file to a separate diskette. This file is located in the `"\SYSTEM"` sub-directory.

3. If your system has *any* valuable user-defined information (*i.e.,* filters, user-defined reports, indexes, batch definitions; user preferences and passwords), the files containing this information should also be backed up. The best procedure for this is to back up all files in the `"\ORGANIZE"` sub-directory by copying these files to a separate diskette. Keep a separate diskette that is labeled for this use.

CAUTION

The **Backup** function on the Maintenance menu saves only the actual database and does *not* include backups of any system or user information.

Follow steps 2 and 3 above to backup your user-defined and user privilege information.

Recalculation of the Database

The **Database Recalculation** function is a powerful and flexible integrity-checking tool. Major features of this module include:

- Upon selection of the **Recalculate Database** option from the Maintenance menu, the System displays a list of all calculation and integrity checks. The user can select all of the checks or just a subset of the checks to be performed.

Note: The option to select just a subset of checks is not available when performing automatic recalculations following the installation of a new software revision.

- When any need for correction is found, the user can opt to:

  - ✓ correct just that problem,

  - ✓ correct all similar problems, or

  - ✓ skip (temporarily) making the correction.

- In rare cases where records with duplicate IDs are found, the user can see both records and select which one to keep.

- Whether problems are fixed or skipped, a report is produced that shows all problems and an indication of whether the problem was fixed at the time by the user. This report can be browsed, printed, or saved as a `.DBF`.

Recalculation and the Exception Report go hand-in-hand. Exceptions are generally "expected" items that occur when all data collection and entry is not yet complete. Recalculation problems generally occur only as a result of hardware, software or procedural problems. A general rule for using these modules is:

1. When a new software revision is received:

    - The Automatic Recalculation is run.

2. Periodically during data entry phases:

    - Run the Exception Report.

3. Prior to exporting to another site:

    - Run Recalculate Database, and

    - Run the Exception Report.

CAUTION

Recalculation problems generally occur only as a result of hardware, software or procedural problems.

Failure to recalculate could cause erroneous and misleading database reporting results.


MANAGING USER ACCOUNTS

Introduction

The **Manage User Accounts** option is available only to the SA. It provides the necessary tools for adding a new user, modifying a user's privileges, and deleting a user from the System.

To access the **Manage User Accounts** option:

1. Select the **Users** option from the File menu.

2. Select the option **Manage User Accounts**.

3. Next you will be prompted to enter YOUR Password for security reasons. Type in YOUR password and press **<Enter>**.

4. The System displays the User Account Management window.
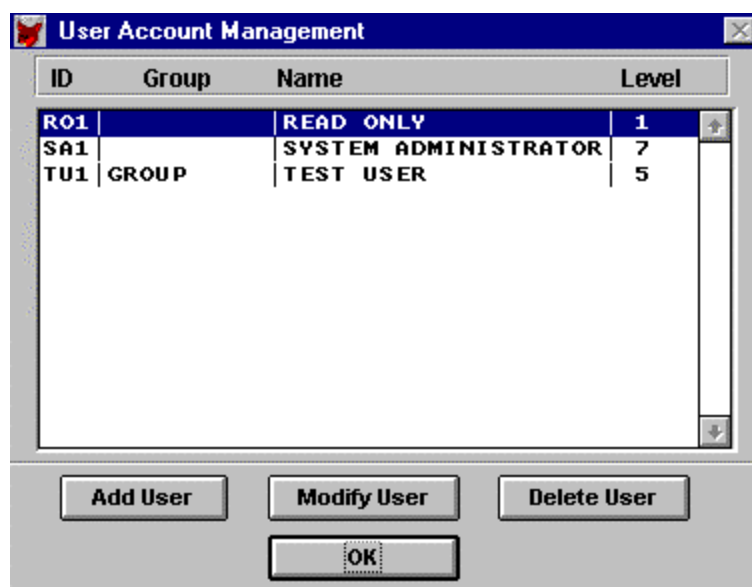
User Account Management Window

Add New User

To add a new user:

1. Access the User Account Management window as described above.

2. Select the **Add User** push button.

3. Enter the First and Last Names of the user you wish to add.

4. The SA may now revise the user's privileges if necessary.

The User Privileges window is discussed in detail in the following section.

The user you have just added to the System is now ready to login to the System as a Read-Only user. The new user should change their initial password, which is the same as their User ID, as soon as they have logged-in to the System.

Modify User Privileges

Editing a user's privileges is also a function accessible only to the SA or co-administrators. Before editing, you are prompted to enter your own password for security reasons.

To modify a user's privileges:

1. Access the User Account Management window as described above.

2. Highlight the User ID whose privileges you wish to edit *and* press **<Enter>**, *or*

3. Select the **Modify User** push button.

4. The User Privileges Window will be displayed, as illustrated below, from which you can edit the access settings for the selected user.

User Privileges Window

Each accessible window element in the User Privileges Window is described below.

Group ID

This feature allows the SA to place a user in a group where privileges may be assigned and maintained for the group instead of individual users.

Organization Level

The **Organization Level** elements indicate the organizational level at which the user operates. This is the key to deciding whether a particular user "owns" (*i.e.* has edit access to) any given record. There are three radio buttons with two associated text fields applicable to this element:

> **(·)** The **System-wide User** radio button indicates whether a user is System-wide (*i.e.* access to all records).

> **(·)** The **Facility-wide** radio button indicates whether a user has access to all records at their facility. Select this button and the associated text field is enabled. The text box captures the Facility Code for the Single Facility-only users.

> **(·)** The **Divisional** radio button indicates whether a user has access only to records assigned to the user's division. Select this button and the associated text field is enabled for capturing the division identifier.

Whenever a user does not "own" the current record, the System performs as though the user was a "Read-Only" user. The access Organization Level element is *independent* of the Access Level element described below. Only the SA or a co-administrator can modify the Organization Level designation for a user.

Access Level and Incremental Privileges

The user's Access Level is presented as seven radio button choices. The privileges associated with each choice are shown below.

Note: Each level includes all privileges in the preceding level(s).

A user's access level is independent of his/her Organization Level. You can create a System-wide user with very limited access, or a Division-only co-administrator (as well as numerous other combinations). Only the SA or a co-administrator can modify the Access Level designation for a user.

Level 1 (●) **Read-Only**
1.   Create/save filters, indexes.

2. Create/save user-defined reports.

3. Edit own password and preferences.

Level 2 (•) Basic Text Entry
4. Edit memo fields.

5. Perform any special function approved by the System Administrator.

Level 3 (•) Data Entry
6. Edit all but most essential data elements (see individual window instructions for how this applies to any given window).

Level 4 (•) Add Records
7. Add new records to the database.

8. Edit any field (except those assigned to special functions for which the user is not approved).

NOTE: A Level 4 user with all special functions approved has full access to everything required for day-to-day operation of the System. This is a good choice for a well-trained database user.

Level 5 (•) Advanced User
9. Edit everything (automatic approval of all special functions).

10. Delete existing records.

11. Exit to FoxPro (If started from within FoxPro).

Level 6 (•) Co-Administrator
12. Add/edit/delete users with access levels 5 and below.

13. Save filters and user-defined reports that are accessible to other users.

14. Perform maintenance activities.

15. Create/use roll-up diskettes (import/export).

Level 7 (•) System Administrator
16. Add/edit/delete co-administrators.

17. Assign System Administrator status to others (*Not Recommended*).

18. Perform External Maintenance activities.

Special Functions

The **Special Functions** check boxes allow certain key features that may require focused training before being made accessible to certain users. Any Level 2, 3, or 4 user can be assigned any combination of special functions.   Level 5 and above users automatically have access to all special functions.   Only the SA or a co-administrator can modify the special function authorizations for a user. The Special Functions are:

- **[X] Scoring/Risk Analysis** - designates whether a user has access to modify the risk-based scoring data for a record.

- **[X] Root Cause Analysis** - designates whether a user can assign root cause codes to an Issue.

- **[X] Cost/Financial Data** - designates whether a user has access to edit cost and resource data.

- **[X] Schedular Data** - indicates whether a user can enter project management fields such as dates and precedence relationships.

- **[X] Status/Closure/QA** - indicates whether a user has the authority to verify and modify the status.   Note that optimum usage of this feature probably suggests that QA personnel be assigned as System-wide users.

Select the **OK** push button to save your changes to the User Privileges window. You may select **Cancel** at any time to discard your changes and return to the Main menu.

Delete User

Only the SA and co-administrators have access to deleting an existing user.

To delete an existing user:

1. Access the User Account Management window as described above.

2. Highlight the User ID you wish to delete.

3. Select the **Delete User** push button.

Guest Logins

If desired by the SA, people may be allowed to login as "GUEST." Guest users have Read-Only privileges, but cannot create user-defined reports,

indexes or filters, and cannot save any user preferences. To enable guest logins, find the line in the `CYCLAFOX.INI` file that reads

```
MaximumGuestLogins=0
```

and change the number to the maximum number of concurrent guest logins you want to allow. Guest users simply enter the User ID as "GUEST." No password is required. (Refer to the System Configuration section of this Guide for instructions on use of `CYCLAFOX.INI`.)

Display Logged-in Users

Any user can display a list of users currently logged-in to the System on a network by selecting **Display Logged-In Users** from the Users menu. The System displays the Active Connections window showing currently logged-in users and their User IDs, date and time of login, and which dataset each user is logged-in to. This window also enables the SA to prevent user logins during maintenance tasks or installation of a new revision.
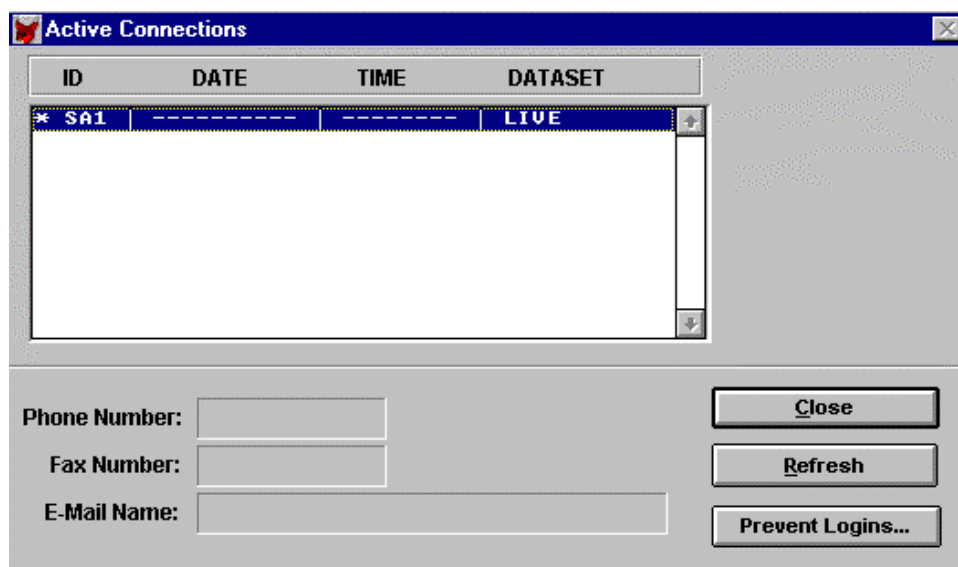
Active Connections Window

To prevent new logins:

1. Select **Display Logged-In Users** from the Users sub-menu.

2. The System displays the Active Connections window.

3. Select the **Prevent Logins...** push button.

4. The System responds with a prompt:

"Prevent all new logins for the next 1 hour and advise users to log out?"

5. Select **Yes** to prevent new logins or **No** to cancel.

6. When finished with this window, select the **Close** push button.

Users who are already logged-in will see a message requesting them to log out soon. This message does not appear immediately; rather, it is dependent on the tasks the user is performing.

The SA can also lock out further logins to a single dataset for a one-hour period in anticipation of maintenance needs for a single dataset. Users already logged-in to that dataset will see a message similar to the above; users logged-in to other datasets are unaffected.

If a SA attempts to login where a lockout message has been placed, they can either:

• accept the lockout and exit;

• ignore the message and proceed with the login; or

• clear the lockout message.

Additional User Account Policy Features

There are several additional user account policy features that the SA can implement through the use of CYCLAFOX.INI file settings.

• The SA can require a user to change his initial password. For example, if a user account is set up for John Smith, and he is the first System user with these initials, his user password would be the same as his User ID: JS1. By adding the following lines to the [Security] section of the INI file, John Smith would be forced to change his password:

```
[Security]
ForcePasswordChange=YES
```

This setting would also prevent Mr. Smith from later re-setting his password to match his USER ID.

• The SA can implement a password expiration scheme, after which time, if a user hasn't changed her password she is either forced to or her account is suspended:

```
[Security]
PasswordExpiration Interval=182
```

The number represents the number of days until the policy goes into effect.   If it is set to "0", then there is no reminder or policy requirement.

Combine with the following setting:

```
[Security]
AllowExpiredLogins=YES
```

If the line is set to "YES", the user is allowed to login and to change her password at that time. If set to "NO", then an expired login is not allowed.

- Finally, the SA can suspend a user account after a certain period of account inactivity by adding these lines to the [Security] section of the INI file:

```
[Security]
InactivitySuspensionInterval=0
```

The number represents the number of days of account inactivity until the account suspension goes into effect. If it is set to "0", then there is no such policy.

NETWORK CONFIGURATION

ESH/Plan Directory Structure

The System sub-directory is the "Network Administration" directory and can be made Read-Only at the Network Operating System (NOS) level for any user without administration privileges.

Network Directories Requiring Read and Write Access

ESHPLAN\ Directory
All Access Levels (0-7)   Files: ESHPLANW.EXE

Note: ESHPLANW.EXE can be made Read-Only for security reasons.

SYSTEM\ Sub-Directory
Administrative Access   Files: User Access
Levels (6-7)   File Locations
                                           Scenario Setups
                                           INI File
                                           Database Dictionary
                                           Reference Tables
                                           Reports
                                           Maintenance APPs

LIVE\ Sub-Directory
All Access Levels   Files: Main Data
except for Read-Only (2-7)   Auto-Numbering
                                           User Session Memory

ORGANIZE\ Sub-Directory
All Access Levels   Files: User-Defined Reports
                                           Index Information
                                           Filters
                                           Batch Definitions
                                           Spell Check

TEMP\ Sub-Directory
All Access Levels   Files: Temporary files
(0-7)

Note: All users need read access to all directories and files.

Multiple Scenario Datasets are allowed (up to six) for whatever purpose(s) the SA determines.

Possible System/Network Management Approaches

1. Assign Read-Only users to be logged-in automatically to a separate dataset to isolate the Live Dataset for a variety of possible reasons, some of which are suggested below.

2. Perform imports on a separate dataset. This dataset could then be copied into the Live Dataset in a maintenance routine when all users are logged out of ESH/Plan. Alternatively, the importing could be performed on the Live Dataset, and users could use a scenario dataset.

3. Perform data entry on the Live Dataset, while all management and reporting is accomplished on a scenario dataset. After all entry and proofreading is complete, copy the Live Dataset. This can result in performance improvement in some network environments.

4. The Training Dataset is a special dataset to be used for training new users within the network environment. This allows new users to be trained without exposing production data to them until they have completed training. The SA can assign separate user access levels for Live *vs*. Training as in the following:

    *   Train a user, who has Read-Only access to the Live Dataset, to perform data entry tasks.

    *   Train a data entry person for System co-administration duties without giving that person administration rights to any live data.

    *   Train a manager how to run reports prior to being granted any access to live data.

    *   Periodically copy the Live Dataset to the Training Dataset, allowing the training data to closely resemble the actual data that the users will ultimately see.

    *   Alternatively, develop a "fixed" training dataset to allow preparation of standard lesson plans with "known" answers.

5. The SA can specify **user/group outer filters** that cause a user to see only a relevant subset of the database. Any user-defined filter works in combination with such an outer filter.

6. Any user can specify a **default outer filter** that causes that user to work with only a relevant subset of the database. Any user-defined filter would work in combination with any such user-specified and/or administrator-defined outer filter.

7. The SA allows **"Guest"** logins. A guest has no password requirement. Multiple users can login as "guest" at the same time. Guest users have no capability to save filters, user-defined indexes,

reports, or batch definitions.　A guest has Read-Only database privileges.

The "Guest" settings can be changed in the [Security Section] of the CYCLAFOX.INI file.　Refer to the section on System Configuration in this Guide.

TOOLS FOR MANAGING MULTIPLE DATASETS

Introduction

The ES&H Management Plan Information System provides the System Administrator with the necessary tools for managing multiple datasets within its application. Use of the Dataset Management module is *completely optional*. There is no usage complexity added to any System where these features are not used. Where used, added complexity is minimal.

Definitions

The **database** is the set of all tables making up each of the views in a system. These include main view tables, child tables, and cross-referencing tables. Tables such as user privileges, filter, preferences, and user-defined reports are system tables and do not constitute part of the database. A **dataset** is one complete version of a database. All datasets have the same files with the same file names. Each dataset is stored in a separate directory, usually a sub-directory directly below the main directory for the software.

Any system for which the System Administrator has not elected to use dataset management has precisely one dataset, which is always called "LIVE" and is stored in the `"\LIVE"` sub-directory.

Motivation for Multiple Datasets

There are numerous instances in which a user might want more than one set of data to be available for the same software system. Some of these include:

- A **practice** dataset in which any user could experiment with and learn various software functions without worrying about affecting the integrity of the live dataset. Examples include data import or global change functions.

- A **training** dataset in which new users can be trained and/or qualified to use the software without exposing them to the live dataset. This dataset could either mirror the live data or could be based on a "standard" dataset that is created to accompany developed test plans.

- A **receiving** dataset for importing and reviewing external data prior to deciding on whether to combine it with the live dataset.

- One or more **snapshot** datasets that can be used to freeze the database at a key milestone date, such as at the end of a fiscal year or upon a key budget submittal. Work can then continue uninterrupted

on the live dataset with the ability to return to the snapshot for reference purposes at any time.

- An **archive** dataset of old closed-out data that is only rarely of interest. Often this type of data presents a difficult choice between deleting the data, whereby it becomes inaccessible or maintaining it in the live dataset. This will degrade performance and lengthen system backup times. Placing this data in a separate dataset only slightly reduces its accessibility, while leaving it out of the way when it is not needed.

- An **entry** dataset where all data entry or data importing is performed. All management access and official output reporting occurs from the live dataset. The System Administrator copies the entry dataset to the live dataset at certain points in time, such as after all data entry has been proofread or after a large block of external data has been imported and reviewed for exceptions. This specific choice of database management can be appropriate when it is important to separate management reporting from data entry work in progress.

- An **alternate** dataset for a completely different organization where separate user groups and reporting is expected. (Frequently this would be handled instead with a separate software installation.)

- A controlled Read-Only **test** dataset for training purposes. This would be used only to copy back into the training dataset in order to re-synchronize that dataset with any developed lesson plan.

Advantages of Dataset Management

In addition to the motivations listed above, the following are some operational advantages of multiple dataset management:

- allows two or more datasets to be accessible while sharing just one copy of the software, system files, lookup tables, user preferences files, and spell checking dictionaries;

- when software revisions are received, all datasets are automatically updated; and

- users can easily switch between any datasets for which they have access without having to exit from the software.

Disadvantages of Dataset Management

The following potential disadvantages must be considered:

- users may forget which dataset they are using; for example, printing a report from a training dataset that they intended to represent live data

(see the next section for how the System attempts to mitigate this risk);

- added disk space is required to maintain the additional copies of the data; and

- an additional File menu option with which inexperienced users must contend.

Differences from the User's Perspective

As soon as the SA creates a second or subsequent dataset, the dataset features of the System are automatically enabled. The users of the System will note the following changes:

- The File menu will include a new bar (the first bar on the menu pad) with the prompt **Open Dataset...**. This choice allows the user to switch between datasets at almost any time during the session.

- Upon logging in the user will see an additional brief message indicating the initial dataset to which they are connected (*e.g.,* "Connecting to LIVE dataset...").

- The System remembers which dataset each user was last connected to and will re-connect them to that dataset upon the next login (or suggest one, as described below).

- The System will either connect the user automatically or prompt them with a list of available datasets based upon the following setting in \SYSTEM\CYCLAFOX.INI:

```
[DATASETS]
[LIVEDATASET]
SelectUponLogin=YES (or NO)
```

Note: If you create any settings for a dataset you must write them beneath the name of that dataset + "DATASETS".

- If the user has access to only one dataset, they are automatically connected to that one, regardless of any of the above. (If the user tries to change datasets, they are informed that they have access to only one.)

- The next to the last line on the backdrop curtain indicates the current dataset and directory where the files are stored.

- Any report "Cover Page" includes that dataset name and location from which the report was produced.

- Both the Current System Status window (hot key **<F2>**) and the Report Selection window indicate the current dataset.

- A user who has edit (write) privileges to the live dataset may not necessarily have similar privileges to each additional dataset (see the section below, "Attributes of a Dataset"). If not, the System behavior will change accordingly as they switch between datasets.

Creating and Managing Datasets

A separate set of functions has been created to allow SAs to create and manage multiple datasets. These functions should be attempted only under the following conditions:

- by a SA (or a co-administrator depending on the setting of "CoadminManageDatasets" in the [Security] section of the INI file);

- with any view closed and live data backed up; and

- with all other users logged out of the System (if on a network).

WARNING!

If running on a network, ensure all other users have logged out of the System.

Any attempt to perform dataset-level operations on a dataset to which others users are connected could be disastrous.

Preparatory steps to perform dataset management functions:

1. If running on a network, ensure all other users have logged out of the System.

2. If you already have more than one dataset (as evidenced by the **Open Dataset** option appearing on the File menu), and you intend to copy or synchronize datasets, you need to ensure you have opened your intended *source* dataset. The next to the last line on the window indicates your current open dataset.

3. Be sure to close any currently open view using **Close View** from the View menu.

To perform the Dataset Management module:

1. Select **Dataset Manager** from the Maintenance sub-menu.

---

2. You are now working in the Dataset Management module. The Dataset Manager window is illustrated below.
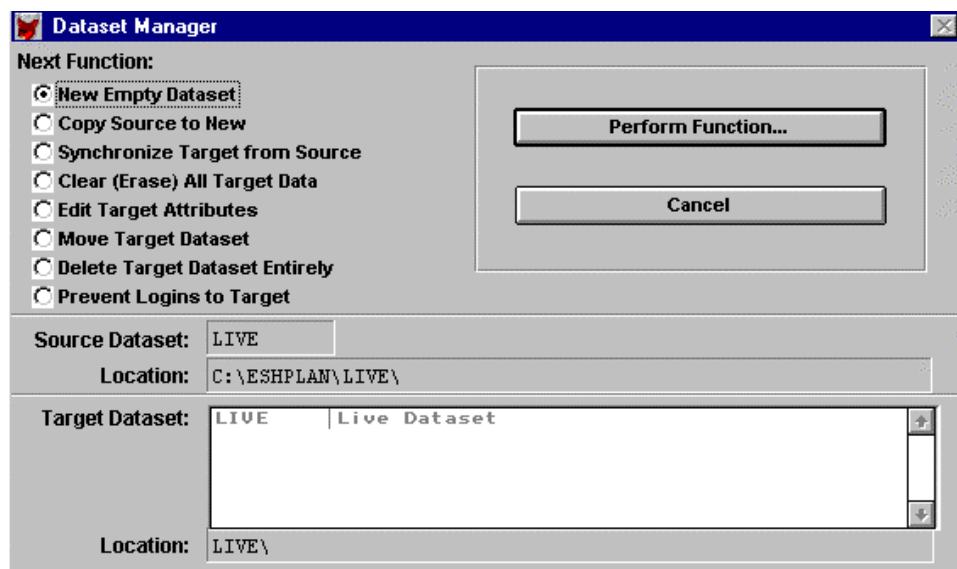
Dataset Manager Window

From the Dataset Manager window:

1. Choose the intended dataset management function from the radio button list. (See function descriptions, below.)

2. *If* your function requires the selection of a target dataset, the list of targets becomes enabled. Choose the desired target for your function. Press **<Tab>** to exit the list.

3. Select the **Perform Function** push button. Follow any further prompts or complete further dialogs as required by your choice of function.

4. If you want to perform any further dataset management function, repeat the previous steps.

5. Select **Cancel** or **Done** to exit the Dataset Management module.

Available Dataset Management Module Functions

• **New Empty Dataset** allows you to create an additional dataset with no records in it. This can be used, for example, to train users on how to initiate use of the System or to prepare for importing records from other sources. You will be prompted to assign a unique dataset ID (one will be suggested). This ID will establish the sub-directory name where the files are maintained. You will then be presented with a

window to create a title and establish the access attributes of the new dataset.

- **Copy Source to New** allows you to create an additional dataset that is a copy of the source (currently selected) dataset as it exists at the point of copying. This can be used to create a snapshot or a new training dataset that matches the live dataset. You will be prompted to assign a unique dataset ID (one will be suggested). This ID will establish the sub-directory name where the files are maintained. You will then be presented with a window to create a title and establish the access attributes of the new dataset. (If you already have more than one dataset, be sure you are connected to the desired source before attempting this function.)

- **Synchronize Target from Source** operates on two *existing* datasets. The *source* dataset (the one to which you are currently connected) is copied over the *target* dataset - replacing any data previously in the target. This is normally used to update other datasets with a copy of the current live data. (If you already have more than one dataset, be sure you are connected to the desired source before attempting this function.)

- **Clear (Erase) All Target Data** allows you to empty a dataset of all data, but retain it in the list of datasets. This essentially returns the dataset to a "new" state. This is commonly used to clear practice or training datasets after temporary usage.

- **Edit Target Attributes** allows you to alter the title and access attributes of a dataset. (See the next section for a discussion of dataset attributes.)

- **Move Target Dataset** - [under development]

- **Delete Target Dataset Entirely** is available to remove an unwanted dataset from the list of registered datasets (and optionally delete all files pertaining to that dataset). This is an irreversible function that should be performed only with great care. **Note:** The "LIVE" dataset cannot be deleted.

- **Prevent Logins to Target** allows the SA to prevent logins to the targeted dataset for one hour. Logged-in users will see a message requesting them to log out soon. This message does not appear immediately; rather, its appearance is dependent on the tasks the user is performing. Users can login to other datasets during this lockout period.

N**ote:** To prevent logins to *all* datasets for one hour, use instead the "Display Logged-In Users" option on the Users sub-menu of the File Menu, and select the "Prevent Logins" button. This window also will show you who is already logged-in and to which datasets.

Attributes of a Dataset

When you select the **Perform Function** push button from the Dataset Manager window the System places you in the Edit Dataset Attributes window, as illustrated below.

Edit Dataset Attributes Window

Each dataset has the following attributes:

Title
Provides a short descriptive title to be used when prompting the user for the dataset with which they want to be connected.

Directory
Indicates where the data files are stored.

Read Access
Indicates the minimum user access level required to be aware of and read the dataset. This is used in conjunction with user privileges to determine the available selection of datasets.

Edit Access
Indicates the minimum user access level required to write data changes to the dataset. This is used in conjunction with user privileges to determine the user's access level while connected to any given dataset.

Reminders to Make Backups
Determines, in conjunction with various `INI` file settings, whether and when a user is warned upon connection to a dataset that has not been backed up within a specified time interval. To avoid unwanted system messages, do not check this box if a dataset never requires being backed up, such as with a practice dataset.

Protected from Overwriting
Check this box to prevent the synchronize or clear functions from being performed with the specified dataset as the target.

Note: The overwriting flag has no bearing on whether data entry changes can be made on the dataset.

Groups Allowed
Indicates a list of user groups allowed access to the dataset. Useful when creating a dataset for use by just a few user groups. If both this field *and* the **Additional Users Allowed** fields are empty, all users with adequate Read Access levels can select the dataset.

Note: Any user group can also be forced to connect to only a single specified dataset by creating the proper setting in the `[Datasets]` section of `CYCLAFOX.INI`.

Additional Users Allowed
Lists individual IDs of users allowed to access the dataset. Can be helpful when creating a dataset for very limited use, such as by System Administrators only. If both this field *and* the **Groups Allowed** fields are empty, all users with adequate Read Access levels can select the dataset.

Scope of System Functions and Features

There are many system functions and features that, when performed, apply to the current dataset; while others apply to the System as a whole. The following lists should clarify the scope of most system functions:

Current Dataset
These functions affect only the Current Dataset:

- Backup and Restore
- Export/Import
- Pack
- Re-index
- Database Recalculation
- Synchronize Numbering
- Repair to Damaged Memo Files

All Datasets

These are System-wide functions, affecting all datasets:

- Software Updates to New Revisions
- CYCLAFOX.INI File Settings
- Add and Delete Users
- User Privileges
- User Preferences
- Filter Designs
- User-Defined Indexes
- User-Defined Reports
- Batch Definitions
- Spell Check Word Additions
- Backup System Information

EXPORTING AND IMPORTING DATA

Exporting Data

The **Export/Import** option on the File menu enables the user to prepare diskettes containing subsets of the Environment, Safety and Health data contained in the System. Export diskettes can be prepared for transferring data between separate installations at one facility (intra-facility transfer), for sending data to a DOE Operations or Secretarial Office (roll-up) or for securing a backup of all of your data. A hard drive or removable drive can also be used to export data.

CAUTION

It is a *requirement* to run an Exception Report prior to Exporting any data. Correct all mandatory exception report items, and correct or verify the acceptability of all non-mandatory items.

Failure to correct these items before Exporting may cause the recipient of the data to produce reports with unexpected results, and nevertheless, will ultimately require the data to be corrected and exported again.

Before performing any data export, be aware of the following important considerations:

- Additional care and communication between the involved System Administrators in all data export/import activities should be used to ensure that it is fully understood what Installation Letters are included on each export diskette. There is a possibility of data loss resulting from importing records having Installation Letters (*i.e.* unique identifiers) that are duplicates of existing records. This possibility exists with both export and import activities. In some cases, a separate dataset can be created for temporarily importing and previewing data.

- Confirm no filter condition exists that would result in the export of an incorrect or incomplete set of records.

- You cannot copy the information contained on an export disk directly into another System installation. You must follow the guidance on importing data to assure the data may be used.

After selecting the **Export/Import** option from the File menu, the System will display the following Export options:

- **Produce Roll-up Diskette** displays the Specify Scope for Export Window with default settings and options enabled for exporting ES&H data to a DOE Operations or Secretarial Office. This window is illustrated below.

- **Export Data WITHIN a Facility** displays a browse list of installed facilities. After selecting a facility, the Specify Scope for Export Window will be displayed, with default settings and options enabled for exporting ES&H data between different installations of the System for the same Facility. You will have the additional option of choosing an installation letter for Intra-Facility transfers of data.

- **Export to External File Format** displays the Export to External File Format Window with default settings and options enabled for exporting ES&H data into other file formats. The ADS View must be selected for this option to be available. This option is discussed under the heading **Exporting Data via Other File Format** later in this section.

Exporting Data via Roll-up or Within a Facility

To export data (a Roll-up or Intra-Facility Diskette):

1. Select **Export/Import** from the File menu.

2. Select **Produce Roll-up Diskette,** *or* select **Export Data WITHIN a Facility**.

3. The System displays the Specify Scope for Export Window.
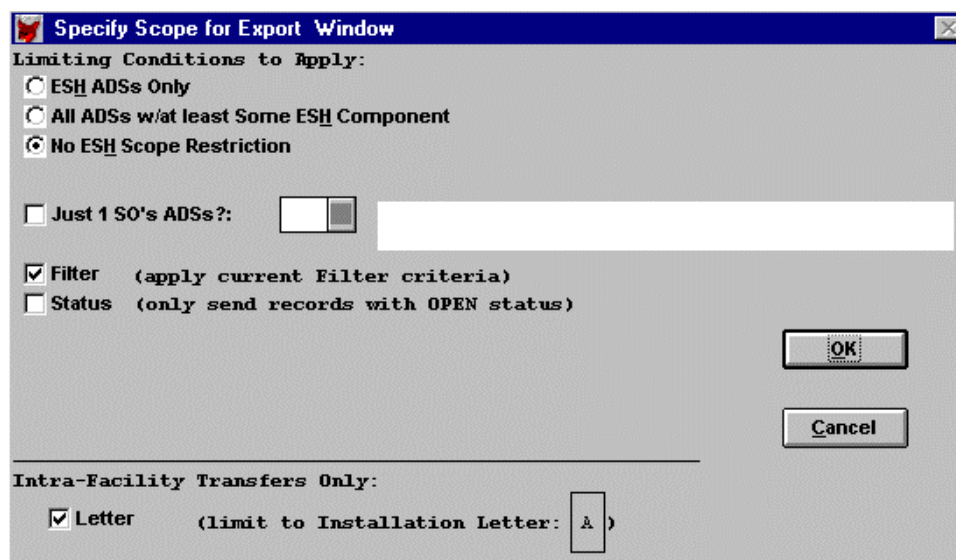
Specify Scope for Export Window

The Specify Scope for Export Window has several default limits and conditions established. The default conditions established should be acceptable for creating diskettes for most facilities. However, you should review and may edit these defaults, which serve to limit the scope of ES&H records that will be exported.

CAUTION

Additional caution is advised with regard to awareness and administrative control of the Installation Letter for installations on each PC and network where the System is installed.

There is the possibility of data loss resulting from importing records having Facility Codes and Installation Letters (*i.e.,* unique identifiers) that are duplicates of existing records. In some cases, a second installation of the System into a separate directory to be used for temporarily importing and previewing data may be prudent and is recommended.

Limiting Conditions

The Limiting Conditions to Apply section of the Specify Scope for Export window contains the following options:

- The **( ) ESH ADS only**, **(·) All ADSs w/at Least Some ESH Component**, or **( ) No ESH Scope restriction** radio buttons limit the exported data to the selected option. Only one of these options can be selected.

- The **[   ] Just 1 SO's ADSs?:** check box, limits the data to be exported to the single SO selected from the popup control.

- The **Filter** check box, if selected, will apply the current filter condition to the export function. *This option will not be available if a filter is not set*.

Note: Be careful to ensure that you do *not* have a filter condition established that would result in an incorrect or incomplete set of ES&H records being exported.

- The **[X] Status** check box, limits the records to be exported to Status codes of **OPEN**.

Note: If you want to export only one facility's data, perform the **Export** option from an ADS window accessed through the Facility View.

- The **Facility Level Data** radio button options are only available when producing Roll-up diskettes:
  (   ) Don't Include
  (   ) Installed Facility Data
  (·) All Facility Data

You should not include facility-level data for intra-facility transfers. This data must be entered at the central installation for the facility.

- The installation **[   ] Letter** check box is enabled only for Intra-facility data transfers. When checked, the default letter 'A' is available for editing. *Be sure to indicate the correct installation letter.*

After editing or accepting the export scope defaults, select the **OK** push button. Selecting the **OK** push button will cause the System to mark the records that meet the conditions you selected, for subsequent copying to diskette(s).

The System will display a dialog window as shown below. This window provides an estimation of floppy disk need:

- The number of records marked;

- the approximate size in bytes needed to store the data; and

- the number of 3.5", 1.44 megabyte (i.e. high density) diskettes needed to capture the data. This is relevant only when copying to diskettes.

```
      Estimation of Floppy Disk Need
# ADS Records Marked:            22

Approx. Bytes Needed:       112,046

# of 3.5" 1.44 MB disks needed:   1
```

The System displays the Specify File Location window where you specify your export directory.
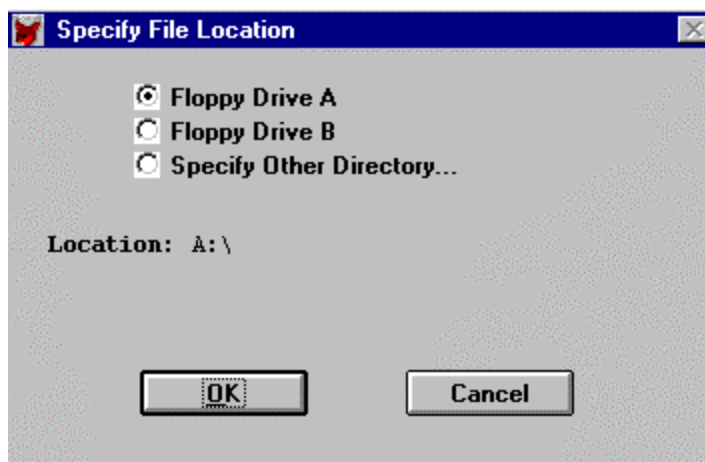
Specify File Location Window

---

1. Select the target drive and directory for copying your data files. Select the Specify Other Directory… radio button, if you want to export to a location other than a floppy drive.

2. If necessary, insert an empty, formatted floppy diskette into the appropriate drive.

3. Select the **OK** push button.

4. The System will copy the data for the records previously marked to files on the target floppy diskette or drive.

Note: You cannot copy the information contained on an export disk directly into another ESH/Plan installation. You must follow the guidance on importing data before the data can be used.

Exporting Data via E-Mail

You can easily prepare a roll-up of your data and attach it to an e-mail message. Follow these steps:

1. Make a new subdirectory under ESH/Plan called "ROLLUP."

2. Within ESH/Plan and the Dataset you wish to export, select **Export/Import** from the File menu and then select **Produce Rollup Diskette**, as outlined above.

3. Specify the scope of the data you wish to Export by identifying the Limiting Conditions to Apply and indicating whether you wish to include Facility-level Data or not, as discussed above.

4. When the Specify File Location window appears, select "Other Directory", and select the path for the Rollup directory you just created. The System will generate the necessary data files and place them in the Rollup directory (or other directory you specified).

CAUTION

If you plan to create more than one rollup, such as for separate facilities, you must create each set of rollup files separately. You cannot place multiple sets of rollup data into the same rollup directory.

---

5. After the Export operation is complete, you can attach the files in the Rollup directory to an e-mail message. You must include ALL of the export files. If the files are large and the receiving organization has unzipping capabilities, you may wish to use a compression utility such

---

as WinZip to compress the files into a single archive file. Either way, your rollup data is ready to send electronically.

Exporting Data via Other File Format

This option allows users to export selected ADS data to one of several external file formats. You can create spreadsheets for specialized data analysis or for the production of graphics. You can also create data fields that can be read by other database management systems. File formats supported include:

`.XLS`	Microsoft Excel Spreadsheet
`.WK1`	Lotus 1-2-3 Spreadsheet
`.DBF`	dBASE III Table
`.SDF`	System Data Format (ASCII flat file)
`.TXT`	Comma Delimited ASCII Text

This option is accessible by all users when the Activity Data Sheet View is selected. Following selection of the **Export to External File Format** option, the System displays the Export to External File Format Window.

Export to External File Format Window

Record Detail
This option allows you to specify the level of detail to use in the exported records. There are two fundamental modes of output produced:

Mode 1 is for creating summary-level information, and is selected by choosing the **( ) Group Totals Only** radio button. In this mode, there will be a single output entry for each distinct group of ADS data. Grouping is

defined in precisely the same way as with all system output reports, *i.e.*, by using the ordering created by the current index in use.

Mode 2 is for creating detailed ADS-level information, and is selected by choosing the **( ) List Each ADS** radio button. In this mode, there will be a single output entry for each ADS.   (Any existing filter conditions are applied, of course.)

If no index is in use, the second mode is the only one available, and the radio button is disabled.

Cost Columns
In either mode, there are three different layouts of cost columns available:

- **( ) 8-Year Profile** will produce nine cost columns - one for each fiscal year from 1998-2005 and one for the sum of these eight columns.

- **( ) 1 Year by Type of Money** will produce five cost columns - one for each type of funding (OE, CE, GPP, LIP) and one for the sum of these four columns.

- **( ) 1 Year by Functional Area** will produce one cost column for each main functional area and one for the sum of all of these columns.

Use the **Cost Columns** radio button to select the desired cost column format.

Year
If either the 2nd or 3rd of the cost column formats is selected, then only one fiscal year of cost data is produced and the user can designate which fiscal year to use. The default is the planning year, FY 2000. When the 8-Year Profile is selected, the profile is always based on FY-1998 through FY-2005.

Row Detail
A further method of formatting the cost data is provided by the **Row Detail** radio buttons. The **1 Row per Record (Total Cost)** choice allows the total cost for each group or ADS to be provided in a single row. The **1 Row per Type of Money** choice allows a separate row to be output for each distinct type of funding (OE, CE, GPP, LIP). In the latter case, rows are only output if costs exist. (That is, there are not necessarily four rows per group or ADS.)

When the second choice is selected, all identifying columns are repeated in each row *and* a further column is inserted to identify the type of funding for each row.

Note: The second choice of the **Cost Column** radio button cannot be logically selected in combination with the second choice of the **Row Detail** radio button.   Thus when either is selected, the corresponding choice on the other radio button is disabled.

Fixed ADS Fields
If Mode 1 of the **Record Detail** (Group Totals) is selected, then the non-cost columns in the exported file are based specifically on the current index definition, and cannot be changed. If Mode 2 (ADS-by-ADS) is selected, the non-cost columns in the exported file include both fixed and optional columns. The fixed columns always come first (*i.e.,* on the left) and include: **Facility**, **ADS Number**, **Funding**, **Funding Case**, **ADS Type** and **Total Score**.

Optional ADS Fields
When Mode 2 (ADS-by-ADS) is used, in addition to the fixed fields, you can specify any combination of several optional fields to appear as output columns:

> **[X] Resp. SO**
> **[ ] Resource Str. Code**
> **[ ] B & R Code**
> **[ ] Pool ID**
> **[X] Title**
> **[X] Cost Categ. (ES&H=12)**
> **[ ] FedPlan?**
> **[X] Status**
> **[ ] Ops Office**
> **[ ] Driver (Primary)**
> **[ ] Contractor Code**
> **[ ] Contractor Division**
> **[ ] Other Score**
> **[ ] Contr Adjustment**
> **[ ] Ops Adjustment**
> **[ ] SO Adjustment**
> **[ ] Original ID**

The optional columns appear between the fixed columns and the cost columns. Certain frequently selected columns are checked as the initial default. If any of these is not desired, simply check the box again to toggle the column off.

File Type
Use the **File Type** popup to select between the available types of external file formats:

```
.XLS Microsoft Excel Spreadsheet
.WK1 Lotus 1-2-3 Spreadsheet
.DBF dBASE III Table
.SDF System Data Format (flat file)
.TXT Comma Delimited Text
```

Export File Name
The **Export File Name** option allows the user to enter a file name and path for the export file. By default the System will produce an export file in the system default directory with the file name and path `\TEMP\ESH_OUT` and the extension corresponding to the type of file being exported (*e.g.* ".XLS" for a Microsoft Excel spreadsheet). Use either the **Export File Name ...** push button or enter the file name directly in the text box to alter this name. If you choose a name that already exists, the System will prompt you before overwriting the existing file.

Browse
The **[ ] Browse before exporting?** check box allows you to preview the export data in a system browse window before committing the results to an external file. Check this box if you want such a preview mode.

Select the **OK** push button once you have the export task defined completely the way you want it. At any point you can instead select the **Cancel** push button to abort the export operation completely

Exporting Issue Management Data

If you have opted to install the Issue Management and Action Tracking Module then you will see an additional export option on the Export/Import menu: **Export Issue Management Data**.

Note: The option to export Assessment, Issue, and Action data is only enabled if either the Assessment view or the Facility and Pool Data view is open, or if no view is open.

---

1. Select **Export/Import** from the File menu.

2. Select **Export Issue Management Data**.

3. The System prompts you to select the directory to which you wish to export the data.

4. Select the target drive and directory for copying your data files.

5. If necessary, insert an empty, formatted floppy diskette into the appropriate drive.

6. Select the **Select** push button.

7. The System will display a prompt for each installation at each facility in the dataset you are exporting. The following is an example:
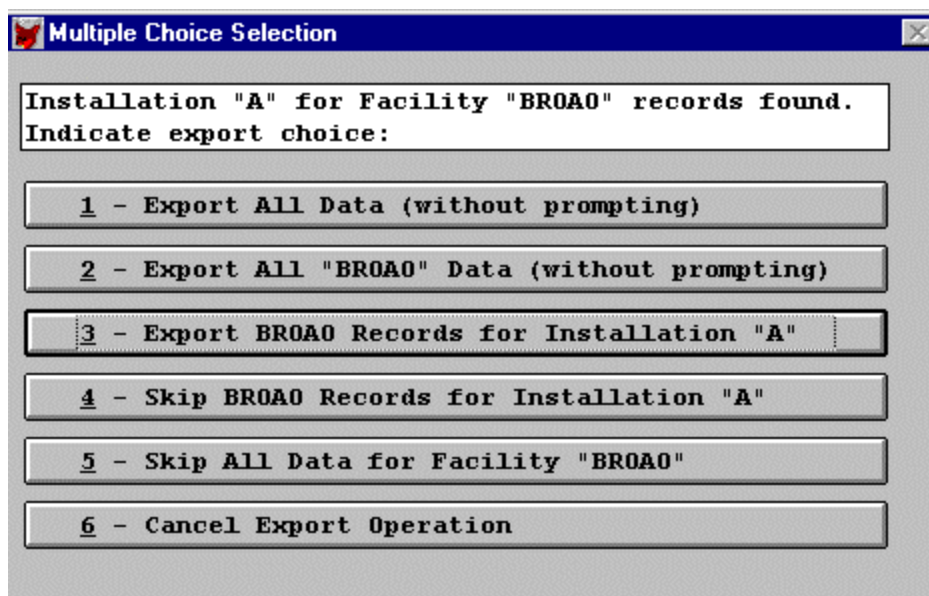
8. Make your selection from these choices. Depending on your choice, and the number of distinct facility/installation combinations, there may be one or many such prompts. As you respond, the System will display a dialog window that provides an estimation of floppy disk need:

    *   the number of records marked;

    *   the approximate size in bytes needed to store the data; and

    *   the number of 3.5", 1.44 megabyte (i.e. high density) diskettes needed to capture the data. This is relevant only when copying to diskettes.

9. The System will prompt you if you wish to proceed with the export. Select the **YES** push button to proceed.

10. The System will copy the data for the records previously marked to files on the target floppy diskette or drive.

As the data is copied the System will tell you the number of Assessment, Issue, and Action records being exported.

Note: You cannot copy the information contained on an export disk directly into another ESH/Plan installation. You must follow the guidance on importing data before the data can be used.

Labeling Your Diskette

After you have created a diskette for exporting your data, you should label the diskette to ensure that the source of information is clearly identified. You should securely affix a diskette label that has the following information:

- a brief description of what the diskette contains (*i.e.*, a title, for example "DOE Facility Data Export" or "DOE Facility Issue Management Data Export"),

- the diskette number (*e.g.*, "Diskette 1 of 1"),

- the installation name (if not contained in the diskette description above),

- the date the diskette was generated, and

- the revision of the ESH/Plan software used to produce the diskette.

Your export diskette is now ready to send to another location, so that the data may be imported into a separate installation of ESH/Plan.

Importing Data

The **Export/Import** option on the File menu also allows you to import compatible data from another source into ESH/Plan.

Note: You cannot copy the information contained on an export disk directly into another ES&H installation. You must follow the guidance below on importing data before the data can be used.

WARNING!

You should only import data into Revision 3.20 (or current revision) of ESH/Plan that was exported from Revision 3.20 (or current revision) of the System. If you attempt to import data from an earlier revision of ESH/Plan, the System will advise you that you are attempting an import with *incompatible* revisions. If this occurs, have the facility that produced the export disks update to a matching revision and then produce a new set of export diskettes.

You should always perform a system backup before importing data received from other computers. This assures that you can return to the previous state if anything goes wrong in the import process.

After selecting the **Export/Import** option from the File menu, the System will display the following import options.

- **Import from Roll-up Diskettes** displays the Specify File Location window which will allow the user to indicate the location of the data to be imported. Next, the Import Method Selection window is displayed to indicate the information about the import diskette and to offer you a choice about the disposition of your existing data that might match that being imported.

- **Import Data WITHIN a Facility** also displays the Specify File Location window and the Import Method Selection window.

- **Import from Other Source** allows you to import data that was placed on a single diskette using an operating system copy command rather than by the Export module. This method of export/import has no database system controls and *is not recommended at this time.*

Importing Data via Roll-up or Within a Facility

To import data from a Roll-up or Intra-Facility Diskette:

1. Select **Export/Import** from the File menu.

2. Select **Import from Roll-up Diskettes** *or* Select **Import Data WITHIN a Facility**.

3. The System displays the Specify File Location window where you indicate the target drive containing your data files.

4. Indicate the correct drive and select the **OK** push button.

5. The System will display the following message:

`Insert floppy diskette #1. Press Any Key When Ready...`

6. If necessary, place your import diskette into the appropriate floppy drive, *and* click with the left mouse button *or* press any key.

7. The System displays the Import Method Selection Window.

Visible across the top of the window is key diskette information from the data you are about to import. You should review this data to confirm that you are importing data that

- was created with the same revision number as your system installation,

- is of the correct Export Type, and

- is from the correct Facility and Installation.

Import Method Selection Window

Facility-Level Data

If the diskette includes facility-level data and you want to import that data, select the **Import Facility-Level Data?: [X] YES** check box. For central administrators receiving intra-facility transfers, *do not* select this box or your facility-level data will be over-written. All facility-level data (including allocable cost pool information) must be entered at the central installation.

WARNING!

Selecting **[X] YES** will over-write all facility-level data on your computer for each facility whose data appears on the diskette. This is seldom desired for intra-facility transfers.

You should backup your data before attempting any import operation.

Intra-Facility

The **Installation [ ] Letter** check box is enabled only for intra-facility data transfers. When checked, the default letter 'A' can be edited. Be sure to indicate the correct installation letter.

Disposition Methods

This section of the Import Method Selection Options window is where you indicate what should be done with existing data in *your* computer from matching locations. Review each choice carefully before making your selection.

WARNING!

Existing records that are deleted by the System when using the **purge** and **replace** methods cannot be retrieved. They are permanently deleted. Be certain of your choice and the resulting consequences before proceeding.

You should backup your data regularly. In particular, backup your data before performing any import operation.

The import process will analyze all data on the diskettes and present you with installation-by-installation prompts as to whether you want to import that particular data. This analysis both provides for administrative flexibility and offers protection of your own database in cases where the nature of the data on the diskettes is uncertain.

This analysis and flexibility applies irrespective of which Over-Write Method you select. The effect of your selection of over-write method is, however, very important, as described below:

CAUTION

Select the **Over-write** Method carefully! You should backup your data before performing an **Import** operation.

Data loss or corruption can result when incorrectly performing one of the over-write methods.

Purge
Selection of **Purge** will cause the System to check for the presence of existing records having the same Facility Code as that shown in the Diskette Information section of the window. If matching records are found, the System will display the following prompt for you to confirm that existing records should be purged from your Database System.

> This option offers a Facility-by-Facility opportunity to ERASE your current data (if any) from a Facility and import that Facility's data from disks. (This is the NORMAL METHOD of importing and is appropriate when the disks contain complete sets of ADS data from one or more Facilities.) Proceed?
>
> **YES   No**

If you select **YES**, the System will delete all existing records within your Database System having a Facility Code matching that of the records to be imported Facility-by-Facility. The System will continue to import records until it encounters an import record with a different Facility Code, or until it reaches the end of the import data file. If the System encounters a different Facility Code it will again prompt you to confirm that you wish to purge all existing records for that location. If it encounters the end of the import data file, it will return you to the System menu window.

If you select **No** at the prompt "Purge Facility (facility code) records?," the following message will be displayed:

 Import aborted! Press any key to return to the menu.

Press any key and you will be returned to the Main menu.

Update
If you select the **Update** Method, and then elect (at a subsequent prompt) to import data from a particular installation, only those records appearing on the diskette set will be updated. No record is ever deleted. As such, if the originating installation previously created and exported an ADS, and subsequently decided to delete that ADS, choosing the Update Method would cause your dataset *not* to match the source dataset. Because of this, the Update Method should *never* be used unless you have specific knowledge that a diskette set contains a partial submittal of records.

Replace
If you select the **Replace** Method, *all records in your database will be deleted*, irrespective of the installations represented on the diskette set. As such, this method is intended for use only in very specific instances where a dataset has no original data of any value, and the SA wishes to replace it completely with the contents on diskette.

Note: After performing an Import you should run the **Re-Calculate Database** option from the Maintenance sub-menu.

Importing Data via E-Mail

If you receive roll-up data attached to an e-mail message, follow these steps to import it into your ESH/Plan installation:

1. Create a new subdirectory under ESH/Plan called "Import." Alternatively, you may wish to identify which facility sent the rollup data by creating a unique directory for each set of rollup data received (e.g., "AL1999").

2. Copy the rollup files you received, such as those attached to an e-mail message, into this directory. If the rollup data has been compressed, extract the files into this directory.

CAUTION

If you receive more than one rollup, you must import each set of rollup files separately. You cannot place multiple sets of rollup data into the same rollup directory prior to importing the data.

---

3. Start ESH/Plan and select the Dataset you wish to Import the rollup data into. NOTE: It is suggested that you create a temporary dataset to import the rollup data into for review before incorporating it into a production dataset (e.g., "Live"). Be careful to check the imported Facility data to assure you are getting only the Facility data necessary for this rollup.

4. Select **Export/Import** from the File menu and then select **Import from Rollup Diskette**.

5. When the Specify File Location window appears, select "Other Directory", and select the path and import directory you just created. The System will import the data into the current dataset. If you created a temporary dataset for import and find the data acceptable, you can then repeat the import process into your production dataset.

Importing Issue Management Data

If you have opted to install the Issue Management and Action Tracking Module then you will see an additional import option on the Export/Import menu: **Import Issue Management Data**.

To import data from an Issue Management Export Diskette:

1. Select **Export/Import** from the File menu.

2. Select **Import Issue Management Data**.

3. The System displays the Specify File Location window where you indicate the target drive containing your data files.

---

4. Indicate the correct drive and select the **OK** push button.

5. The System will display the following message:

6. **Insert floppy diskette #1. Press Any Key When Ready...**

7. If necessary, place your import diskette into the appropriate floppy drive, *and* click with the left mouse button *or* press any key.

8. The System displays the Set Import Options window where you indicate what should be done with the existing data in *your* computer from matching locations.

Set Import Options Window

Refer to the section above on Disposition Methods to be sure that you understand the consequences of your choice.

WARNING!

Existing records that are deleted by the System when using the **purge** and **replace** methods cannot be retrieved. They are permanently deleted. Be certain of your choice and the resulting consequences before proceeding.

You should backup your data regularly. In particular, backup your data before performing any import operation.

---

9. The System will display a prompt for each installation at each facility in the dataset you are exporting. The following is an example:

```
┌─────────────────────────────────────────────────────────────┐
│ ▚ Multiple Choice Selection                               ☒ │
├─────────────────────────────────────────────────────────────┤
│  ┌─────────────────────────────────────────────────────────┐│
│  │ Installation "B" for Facility "BROAO" records found.    ││
│  │ Indicate import choice:                                 ││
│  └─────────────────────────────────────────────────────────┘│
│                                                               │
│   ┌───────────────────────────────────────────────────────┐ │
│   │  1 - Import All Data (without prompting)               │ │
│   └───────────────────────────────────────────────────────┘ │
│   ┌───────────────────────────────────────────────────────┐ │
│   │  2 - Import All "BROAO" Data (without prompting)       │ │
│   └───────────────────────────────────────────────────────┘ │
│   ┌───────────────────────────────────────────────────────┐ │
│   │  3 - Import BROAO Records for Installation "B"         │ │
│   └───────────────────────────────────────────────────────┘ │
│   ┌───────────────────────────────────────────────────────┐ │
│   │  4 - Skip BROAO Records for Installation "B"           │ │
│   └───────────────────────────────────────────────────────┘ │
│   ┌───────────────────────────────────────────────────────┐ │
│   │  5 - Skip All Data for Facility "BROAO"               │ │
│   └───────────────────────────────────────────────────────┘ │
│   ┌───────────────────────────────────────────────────────┐ │
│   │  6 - Cancel Further Importing                          │ │
│   └───────────────────────────────────────────────────────┘ │
│                                                               │
└─────────────────────────────────────────────────────────────┘
```
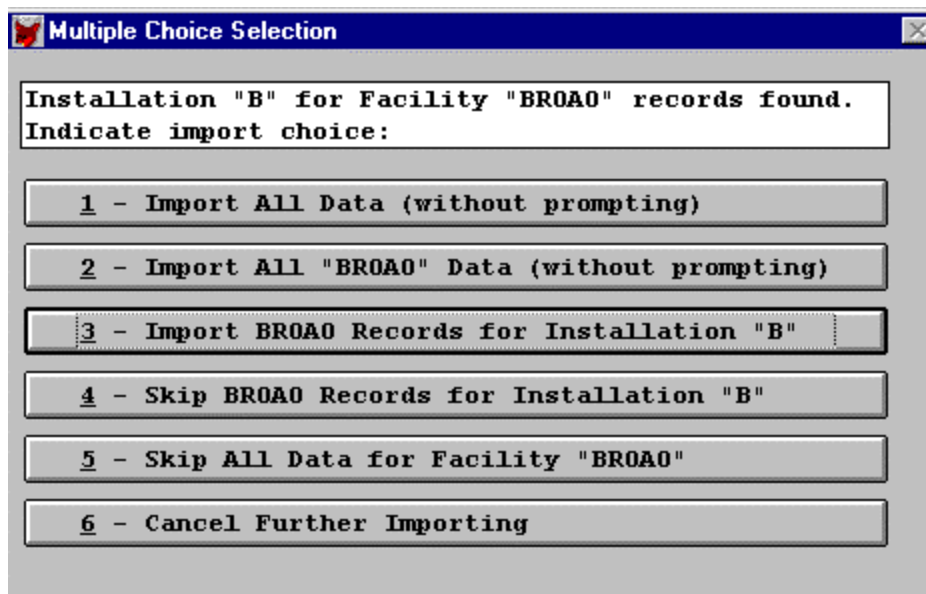
10. Make your selection from these choices. Depending on your choice, and the number of distinct facility/installation combinations, there may be one or many such prompts.

11. After performing an Import you should run the **ReCalculate Database** option from the Maintenance sub-menu.

TRANSACTION LOGGING AND DATA TRACKING

Overview

Transaction Logging is a temporary maintenance tool used to track all database changes over a finite time period. The log itself *is not considered to be part of the database.* If you have a need for the historical values of *specific* fields to be permanently maintained then you should use the Data Tracking feature. The historical table created by Data Tracking is considered a *permanent part of the database.* Backup and dataset management functions also operate on the `DataTrak.DBF` if it exists.

Transaction Logging

The Transaction Log is an optional feature that allows the System Administrator to record all changes made to any dataset over time. The date, time, and ID of the user making the changes are also tracked.

Data verification is just one application of this feature. For example, at the end of each day, the SA can print a report showing each revision (Add, Change or Delete) including old values and new values. It is now an easy task to proof the day's data entry. This is particularly useful on a network when more than one user performs data entry. In case of hardware or software failure, these files could be used to manually reconstruct changes made since the last backup.

Turning on the Transaction Log

The setting for the Transaction Logging is specified in the `[Integrity]` section of the `CYCLAFOX.INI` file by the `TransactionLogging` setting. The default status for the Transaction Log is 'OFF'. The following steps will 'turn on' the Transaction Log capability.

1. Use a text editor to modify the `CYCLAFOX.INI` file in the "`\SYSTEM`" sub-directory, *or* from within The System, select **Edit INI file** from the Maintenance sub-menu.

2. In the `[Integrity]` section, change the line

    ```
    TransactionLogging=NO
            to
    TransactionLogging=YES.
    ```

3. To log all but memo field changes (which consume significant disk space), include the following additional line:

    ```
    LogMemoChanges=NO.
    ```

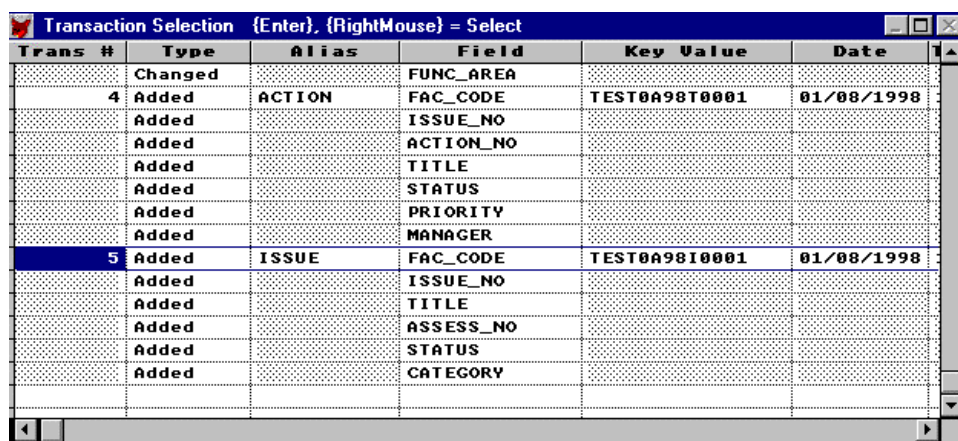4. Save the `CYCLAFOX.INI` text file.

5. Start the System. If within the System, you must first **Exit** and then restart ESH/Plan.

If other users are logged-in, they must **Exit** the System and restart for the INI file changes to take effect. After changes have been made, you may access the Transaction Log window from the View menu at any time. (It is available for all users above Read-Only status.) You may browse and print all or part of the log. You may also filter by alias, date range, or by a User ID.

If the Multiple Dataset Management feature is in use, and Transaction Logging is turned on, changes made to all datasets are tracked. Associated files are created as needed in each dataset directory.

Browsing the Transaction Log

Highlight a record to view from the Transaction Selection window, as illustrated below.

Trans #	Type	Alias	Field	Key Value	Date
	Changed		FUNC_AREA		
4	Added	ACTION	FAC_CODE	TEST0A98T0001	01/08/1998
	Added		ISSUE_NO		
	Added		ACTION_NO		
	Added		TITLE		
	Added		STATUS		
	Added		PRIORITY		
	Added		MANAGER		
5	Added	ISSUE	FAC_CODE	TEST0A98I0001	01/08/1998
	Added		ISSUE_NO		
	Added		TITLE		
	Added		ASSESS_NO		
	Added		STATUS		
	Added		CATEGORY		

Transaction Selection Window

Note: A transaction consists of all changes made to the database before a 'Save' is executed by the System. Some of the actions a user may perform to execute a direct or implicit 'Save' include selecting the **Save** option on each window or menu, or moving from one record to another.

Browse Window Components:

Trans #
A unique sequential number to identify each transaction.

Type
The three types are (A) Added, (C) Changed and (D) Deleted.

Alias
This is the name of the affected data table.

Fields
This is the name of the affected data field.

Key Value
This is the value for each transaction record that makes it unique. For instance, if the alias is Issue, then the Key Value would be the IssueNo. If the Alias is ADS, then the Key Value would be the ADSNo.
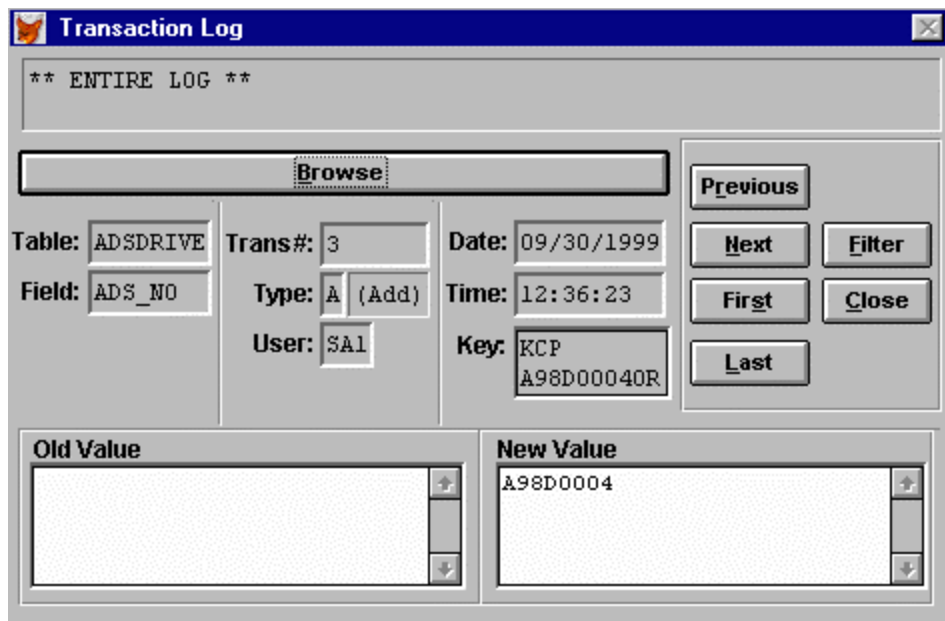
Date
This is the date of the revision.

Time
This is the time of the revision.

User
This is the User ID of the user producing the change(s).

Selecting a Transaction Log Record

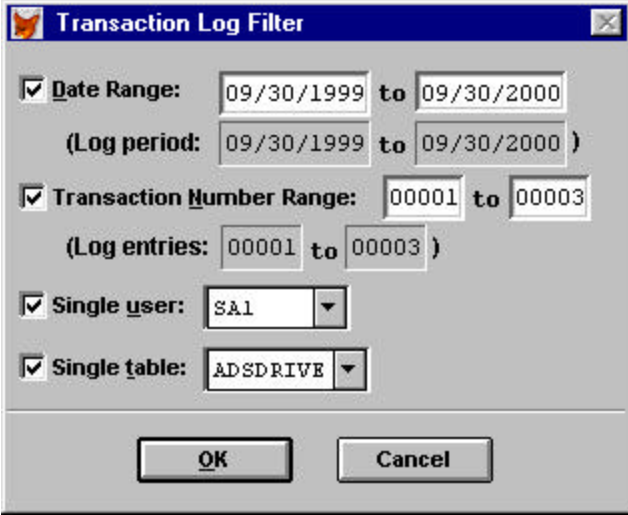Select a highlighted record from the browse list.   The System then displays a full detail window for that record.

Transaction Log Window

Within this window you can review detailed information regarding each change to the database.   Note the Old Value and New Value blocks. These areas capture the old and new values for each change -- even large memo fields.

The navigational push buttons allow you to move within the Transaction Log. Select the **Filter** push button to display the filter window for viewing or printing a subset of the Transaction Log.

Transaction Log Filter Window

Transaction Log Maintenance

The Transaction Log is recorded in two tables, TRANS.DBF and TRANS_LI.DBF, which are maintained in the current dataset sub-directory. These files can quickly grow to be very large, particularly if memo field changes are being logged. The files can be deleted or archived at any time, and, given the feature is still enabled, new empty tables are created when needed.

Note: Clearing the log is a decision that trades off disk space with the amount of available historical information. If you have plenty of disk space, there is no system requirement to clear this log.

Usually, System Administrators prefer to clear out the Transaction Log after a periodic backup has been archived (perhaps monthly). To clear the Log, simply ensure that all users are logged out and then delete files TRANS*.*. For added archive thoroughness, you can first backup these files, although they typically are too large for floppy disk backups.

Data Tracking

Data Tracking allows the SA to specify certain fields that should be tracked historically and permanently. All changes made to any field designated for Data Tracking are recorded in a separate table, `DataTrak.DBF`, in the dataset sub-directory. When at least one field for any view is designated for Data Tracking, an additional option appears on the Table menu (i.e., ADS, Facility, Assessment, Issue or Action) to view the field's historical data. It is also easy to incorporate historical information into standard reports.

Note: Memo fields are *not* tracked with the Data Tracking feature.

Designate a Field for Data Tracking

The SA can add lines to the `CYCLAFOX.INI` file in the "`\SYSTEM`" sub-directory to enable Data Tracking for specific fields. This is accomplished using lines such as:

```
[DataTracking]
TrackChanges=YES
TrackField=MANAGER
TrackField=STATUS
TrackField=...
```

Note: If there is more than one table with the same field name, use a line such as: `TrackField=ISSUE.STATUS`

Save the `CYCLAFOX.INI` text file and start the System. If this edit was done from within the System (from the **EDIT INI file** option on the Maintenance sub-menu), you must first **Exit** and then restart the System.

GLOBAL CHANGE

In this section. . .

Overview

The ES&H Management Plan Information System has the capability to allow groups of ADS records to be revised together, thus allowing for significant time savings and improved quality in certain circumstances. Changes are made to *all records* in a filtered set, or, if no filter is applied, to *all records in the database*. This capability is accessed using the **Global Change** option from the Organize menu. *This capability is available only to System Administrator and Co-Administrator level users.* The options include:

- global changes to one or more of approximately 20 fields (see below),

- global deferral or escalation of ADSs, and

- automatic fill-in of Funding Case field by providing Target budget limits.

CAUTION

Extreme care should be exercised when using these functions. Consider practicing with them on a separate **Training** dataset, or at a minimum, performing a full system backup before attempting to use these functions.

If a filter is set, the change is made to all records meeting the filter conditions. If no filter is set, the change is made to all records in the database.

Selection of **Global Change** from the Organize menu displays the Specify ADS Global Change Function window.
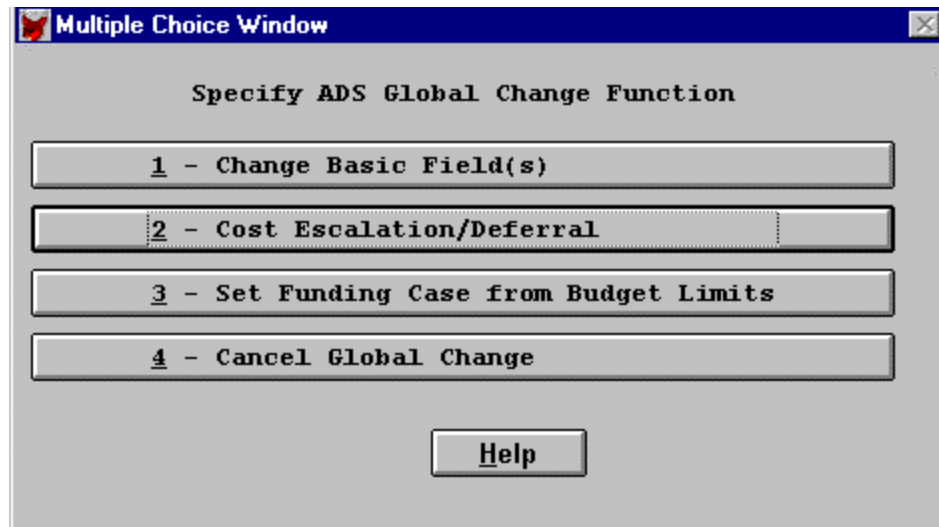
Specify ADS Global Change Function Window

There are three global change options available in the window, in addition to the option **Cancel Global Change**.

Change Basic Fields

Selection of **1 - Change Basic Field(s)** displays the Global Change to Basic Fields Window. Select a check box to make the global change to the indicated field. Once checked, provide a new value for that field. The change will apply to *all qualified* records.

Global Change to Basic Fields Window

CAUTION

If you check the field box and leave the value empty, make certain that this is your intention.

For regular text fields, if you check the field's check box, and leave the Global Change to Basic Fields Window's field value empty, the corresponding field will be *erased* in all qualifying records!

The text below illustrates the global change basic fields in addition to notes on usage.

Global Change Basic Field(s)

General Notes
1. If no filter is set, the global change is made to *all records*.

2. Global update changes are *not* written to the Transaction Log.

3. Press **<F1>** for help when using the window or select the **Help** push button.

Status
Status can be changed to only OPEN or PART.

Funding Case
Note that a separate function exists to globally change this field based on budget limits.

Approved
No specific notes.

Escalated
No specific notes.

Pool ID
This field is changed for only indirect ADSs, even if others are in filter set.

Pool ID, Resp. SO, Contractor, Res Code, B&R Code
These fields are not changed if window entry is left blank (*i.e.*, you cannot use Global Change to *erase* these fields - all other available fields can be erased using this function).

Account No, WBS Code, Division
No specific notes.

Ctr Manager and Phone
These two fields are changed in tandem - be sure to fill in both or one will be changed to blanks.

DOE Manager and Phone
These two fields are changed in tandem - be sure to fill in both or one will
be changed to blanks.

Scored By
No specific notes.

Score Date
No specific notes.

Open Codes
No specific notes.

When finished with this window, select the **OK** push button to save the
global changes or the **Cancel** push button to cancel your changes and
return to the previous window.

Cost/Escalation Deferral

Escalation of an ADS is an optional step that allows you to first enter the
ADS costs in current dollars (unescalated), and then subsequently to
apply standard escalation factors (*e.g.* those specified in the Chief
Financial Officer's annual Field Budget Call). To escalate a single ADS,
after you enter the ADS costs in current dollars (unescalated), you click on
the "Escal/Defer…" button on the right side of the "ADS
Resource/Resource Data Window". When you do this, you should get the
Cost Escalation/Deferral Window. In the Cost Escalation/Deferral Window,
in the section entitled "Escalation Factors", enter the escalation factor(s)
for the year(s) that need to be escalated. For example, if you want to
escalate all types of funds for the FY 2002 ES&H Planning and Budgeting
Cycle, beginning with fiscal years FY 2001 through 2007 by 2.9% for each
fiscal year, you would enter an escalation factor of 1.029 in the "white"
boxes in the "Escalation Factors" section for fiscal years 2001 through
2007. Then click the "OK" button. Now, you should get a screen that asks
you "Save these settings as subsequent defaults?". As applicable to your
situation, click on either the "Yes" or "No" Button in this screen. Now, the
system will return you to the "ADS Resource/Resource Data Window".
You will notice that the system has escalated the ADS costs. Since you
have escalated the ADS costs, you should click in the box on the right
side of the screen entitled "Escalated". When you click on this box, a
check mark should appear in the box, indicating the ADS Costs have been
escalated.

You may perform escalation on a group of ADSs at once by using the
Global Change function. Refer to **Global Change** section on how to
apply this feature of the software.

Deferral of an ADS is a step that lets you automate the process of
delaying implementation of an activity that cannot be funded currently by a
specified number of years. Generally, deferral occurs later in the process
than escalation. The deferral function does apply *incremental escalation* to

account for the *shift* in years, but it assumes that the initial cost profile already represents escalated dollars.

Selection of **2 - Cost Escalation/Deferral** displays the Cost/Escalation Deferral Window, as illustrated below.

Cost/ Escalation Deferral Window

Starting with FY:
This field determines the first fiscal year for which existing costs will be affected (except for backward deferrals).

Defer by:
This field determines whether you are *escalating* or *deferring*. These are *very different* concepts (see above). Set this value to 0 (zero) to escalate a cost profile. To defer (shift) a cost profile, specify the number of years for the shift. Positive values shift the costs out in time. Negative values bring the costs nearer in time.

[X] Defer FTEs Also?
This field is disabled if 0 (zero) is specified (no deferral).

Apply to:
Select the desired funds from the popup (*i.e.*, OE, CE, GPP, LIP, or ALL). In general, different escalation factors apply to OE than to other types.

Note: Use global change carefully. Practice using this function with a training dataset, or from the spreadsheet for a single ADS at a time before applying large global changes to your database.

Escalation Factors
With the **Defer by:** value set to 0 (zero), enter the escalation factor for a fiscal year. For example, for a 2.9% escalation, you would enter 1.0290.

When finished with this window, select the **OK** push button to save the global changes or the **Cancel** push button to cancel your changes and return to the previous window.

Set Funding Case from Budget Limits

The advanced option of **3 - Set Funding Case from Budget Limits** allows you to automate the process of changing the **Funding Case** field (Target vs. Unfunded) for a set of filtered records by entering the budget cut-off limit.

1. Enter the budget cut-off in the **Target Level** field (in $000).

2. Select the **Funding Type** on which to base the budget cut-off from the radio buttons: ALL, OE, CE, GPP, or LIP. The default is "ALL."

3. Indicate the **Fiscal Year** on which to base the budget cut-off.

4. When finished with this window, select the **OK** push button to save the global changes or the **Cancel** push button to cancel your changes and return to the previous window.

5. These parameters will apply to all records in a filtered set, or, if no filter is applied, to all records in the database.

The choice of those records that are marked as "Target" is dependent on the current index when this option is selected. An index based on Total Score is typically used.

SYSTEM MAINTENANCE

Overview

Some aspects of system maintenance may be performed internally, *i.e.*, by selecting the **Maintenance** option from the File menu. Most of these menu options are available only to the System Administrator or Co-Administrator. All user access levels may browse or print the error log.

Note: System maintenance may not be performed while another user is logged-in to the System.

Maintenance Menu

Maintenance menu options are described below:

- **Re-Index Database**
  Recreate all database indexes, ensuring consistency. This option should be used if an index file becomes corrupted. Select it when an indexed data table does not accurately reflect the current status of the table.

- **Recalculate Database**
  Recalculate all calculated scoring and cost fields to ensure calculated field integrity.

- **Synchronize Auto-Numbering Table**
  Review and update the auto-numbering table to correct any discrepancies. This routine should only be run if a user receives a message that the System attempted to assign a duplicate ID.

- **Pack Database**
  Remove records marked for full deletion and the memo files associated with those marked records, freeing up disk space on your hard drive. Records cannot be recovered after performance of this step.

- **Check Memo File Integrity**
  Attempt to repair certain types of memo file corruption, if found. This routine should only be run if a system error indicates such a problem (rare).

- **Backup**
  See the next section in this guide, Backup and Restore, for a full description of this option.

- **Restore**
  See the next section in this guide, Backup and Restore, for a full description of this option.

- **Dataset Manager**
  The SA or Co-Administrator can manage multiple datasets in the System. See the section on Tools for Managing Multiple Datasets in this Guide.

- **Edit INI file**
  Access the CYCLAFOX.INI file without exiting the System. Refer to the section on System Configuration in this Guide for more information.

- **Clear Error Log**
  Erase the error log, freeing up valuable disk space.

- **View Error Log**
  Browse recorded errors with an option to print individual error information.

In addition to the above maintenance tasks, there are two additional features that are essential to maintaining the integrity of your System: **Backup** and **Restore**. Refer to the section Backup and Restore in this Guide for details.

BACKUP AND RESTORE

In this section. . .

There are two features that are essential to maintaining the integrity of your System: **Backup** and **Restore**.

Backup

Backup allows you to backup specific data files, along with their associated text and index files. You should backup your data often and routinely, to ensure against data loss in the event of a system failure.

To make a backup diskette:

1. Select **Maintenance** from the File Menu.

2. Select **Backup**. The System responds with a confirming prompt.

3. The Specify File Location window is displayed. Identify the target drive for backup of your data.

4. If necessary, insert an empty, formatted floppy diskette into the appropriate drive.

5. Select the **OK** push button.

6. The System will create the backup files and copy them onto your targeted drive.

7. Label your diskette(s) appropriately.

Note: The **Backup** option from the Maintenance menu simply backs up the database files (*e.g.* the ADS, Facility, Assessment, Issue, and Action records) of your ESH/Plan installation. It *does not* back up user-specific information, (*e.g.* user preferences), organizational tools (*e.g.*, user-defined indexes, filters, or reports), and other system administrative type data. This data must be backed up *external* to the System. Refer to the section below on Backing up Administrative Data for instructions.

Restore

Restore will allow you to restore data from a backup diskette previously created from the System. If you produce backup diskettes regularly from the Maintenance menu, you will be well placed to recover from any hardware/system failure with a minimum of data loss. In the event of such a failure, you can first re-install the software, then enter the system and select the **Restore** option from the Maintenance menu. This action completely erases any existing ESH/Plan data on your hard disk and replaces it with data on floppy diskettes.

Note: The **Backup** process eliminates deleted records and compresses unused space in memo files. Performing a **Backup** followed immediately by a **Restore** will generally result in recovery of some disk space.

To restore data from a **BACKUP** diskette created with the ESH/Plan software:

1. Select **Maintenance** from the File menu.

2. Select **Restore**. The System responds with a warning to assure that you are attempting to perform a restoration with data from a previous backup.

3. The Specify File Location window is displayed.

4. Identify the correct drive letter and select the **OK** push button.

5. The System will display the following message if a floppy drive was chosen:

    Insert floppy diskette #1. Press Any Key When Ready...

6. Place your import diskette into the appropriate floppy drive, *and* click with the left button mouse button, *or* press any key.

7. The System will again provide a warning with an option to cancel the restore operation if you wish.

The **Restore** process is simple and the user is provided with at least two opportunities to cancel the request prior to committing to the action. Window messages provide strong warnings of the significance of performing a **Restore**.

Backing Up Administrative Data

User-specific information, (*e.g.* user preferences), organizational tools (*e.g.*, user-defined indexes, filters, or reports), and other system administrative type data should be routinely backed up by the System Administrator. Unlike the **Backup** option from the Maintenance menu, which is performed internal to your System installation, a backup of administrative type data is performed external to your System installation.

User preferences are stored in files with names of `USERPRIV.*` in the "`\SYSTEM`" sub-directory of the main database directory. The System configuration file `CYCLAFOX.INI`, which contains numerous settings that can be modified for specific needs, should also be backed up. It, too, is stored in the "`\SYSTEM`" sub-directory.

All user-defined indexes, filters, and reports are stored in the "`\ORGANIZE`" sub-directory. The SA should also backup the files in this sub-directory.

EXTERNAL MAINTENANCE MODULE

In this section. . .

External Maintenance Module

System Administrators who do not have FoxPro can use the External Maintenance Module. It allows a System Administrator to suspend system execution to attempt maintenance or troubleshooting tasks that could not otherwise be performed. It allows for remote troubleshooting by technical support personnel. Almost any single FoxPro command can be typed in the window. Selection of **Execute Commands** performs as though FoxPro were being used. System Administrators should only use this module in combination with specific instructions from Technical Support. As in all volatile processes involving your data, a backup diskette should be made before using this module.

1. Select the **External Maintenance** option from the Help menu.

2. The External Maintenance Module window is displayed.

3. Navigate from the Enter Command Box to the **Execute Commands** push button to the **Close** push button by using the mouse or **<Tab>** key.

4. With the cursor in the Enter Command Box, type a valid FoxPro command in the text editing region. If a previous command is already there, erase or type over the command. Do not ever allow two commands to exist in the text region. Do not use any carriage returns in your command.

5. Select **Execute Commands**.

6. Run additional commands by editing or replacing a previously entered command.

7. Select **Close** at any time to exit.

The box in the upper right corner of the window lists all of the open tables. If you highlight a table and select the browse button then you will be in a read-only browse window.

External Maintenance Module Window

Note: Any data changes performed while using the External Maintenance Module will *not* be recorded in the Transaction Log.

SYSTEM CONFIGURATION

In this section. . .

CYCLAFOX.INI File

The `CYCLAFOX.INI` file (hereafter, "`INI` file") is a software initialization file that offers the ability to allow extensive administrator customization of system options. This customization allows great flexibility in System function and use. The `INI` file, located in the "`\SYSTEM`" sub-directory, can be updated by the SA to set system-wide preferences and is updated automatically when certain functions are performed.

You may use a text editor to modify the `INI` file *or* if you are logged-in to the System, simply select **Edit INI file** from the Maintenance sub-menu. You can save your changes to the `INI` file by pressing CTRL+W in combination. After saving the `INI` file, start the System. If you are currently logged-in to the System, you must first **Exit** and then restart the System. If working on a network and other users are logged-in, they must **Exit** the System and restart for any `INI` file changes to take effect.

The `INI` file is divided into sections for ease of organization. Each section commences with the section name in brackets. Standard section names are:

```
[System]
[Integrity]
[Security]
[SpellChecking]
[ExceptionReport]
[DataTracking]
[Datasets]
[Custom]
```

The section names are not case sensitive and the order in which they appear is unimportant; however, one section name cannot appear more than once (or the second and subsequent sections would be ignored).

Each section can contain as many "settings" as necessary. A setting is always indicated via the syntax:

```
<SettingName>=<SettingValue>

e.g., BackupReminderInterval=7
```

There are no spaces in either the setting name or on either side of the equal sign. The setting name is not case sensitive. Nevertheless, if the setting itself is a character string, it is case sensitive. There are never any quotation marks or anything that indicates data types. A semi-colon at the beginning of a line is used for comments.

The `INI` file settings are described by section in the following paragraphs. Every setting other than "`LastRevision`" has a default value, and is not specifically required to be in the `INI` file. Nevertheless, by including these

settings, the SA may become more aware of the level of customization available.

[System]

The [System] section includes general system names and related workstation requirements and startup options. These are used by Common functions, in report headings, and other forms of system output. They include:

Setting:	LocalSystemName=ES&H Management Plan Information System
Usage:	Allow local customization of software name.

Setting:	IssueManagement=YES|NO
Usage:	Allow usage of the Issue Management module. Set to YES to have available the Assessment, Issue, and Action views in addition to the ADS and Facility views.

Setting:	Infrastructure=YES|NO
Usage:	Allow usage of the Infrastructure module. Set to YES to have access to Infrastructure fields, reports, modules and screens.

Setting:	LocalSystemLogo=ESHPLAN
Usage:	8 characters maximum. Allow local customization of software logo appearing in the backdrop area when first entering the System.

Setting:	InstallationLetter=A
Usage:	Current installation letter for this installation.

Setting:	LocalHelpPerson=System Administrator
Usage:	Allow customization of System Information window.

Setting:	LocalHelpPhone=555-1212
Usage:	Allow customization of System Information window.

Setting:	MinimumFileHandles=70
Usage:	Default=70, can attempt weak workstation login by lowering. This affects DOS only.

Setting:	MinimumMemvars=400
Usage:	Default=400, can attempt memory fine tuning.

Setting:	ProceedOnMvcountFailure=YES|NO
Usage:	Attempt to use system even if MVCOUNT is insufficient in CONFIG file.

Setting:	SpreadsheetFolder=<Folder or Directory Path>
Usage:	Specify the directory or folder to place files created using the "spreadsheet output" option from the Report Selection window or Batch Definition window. By

default, any such file is placed in the TEMP\subdirectory of the System being run.

Example: SpreadsheetFolder=C:\DOC\EXCEL\

Setting: SpreadsheetExtension=<Extension>
Usage: Specify the file type that is created if "spreadsheet output" is selected from the Report Selection window or Batch Definition window. The default is XLS (Microsoft Excel). Other options include SDF, DBF, WK1, WKS, and DIF.

Example: SpreadsheetExtension=WKS

Setting: ManagersMenuPreview=YES|<u>NO</u>
Usage: Set to YES to preview a batch report from the Manager's menu.

Setting: FloppyDiskMargin=500
Usage: Allow increase of bytes if a user gets a "Disk Full" error when exporting data. Default = 500.

[Security]

The [Security] section allows for extensive configuration of various user rights and privileges. These are used mostly by Common functions, particularly in configuring the Main menu. They include:

Setting: LastRevision=3.20(b)
Usage: Controlled by System Functions - DO NOT TOUCH!!.

Setting: OnlyUser=SA1
Usage: For a single-System user on a stand-alone computer. The user will not see the login window.

Setting: PasswordsRequired=<u>YES</u>|NO
Usage: This setting works with the OnlyUser=SA1 for single-System usage.

Setting: ForcePasswordChange=YES|<u>NO</u>
Usage: Set to YES to require a change from initial, temporary password. Also prevents re-set later to password matching User ID.

Setting: MaximumGuestLogins=1
Usage: Set to 0 (default) to disallow guest logins. Maximum of 20 is allowed at one time.

Setting: RequireGuestName=YES|<u>NO</u>
Usage: Set to YES to force guests to give name (N/A if guests disallowed).

Setting: GuestPassword=<Password>
Usage: Set a system-wide guest password (N/A if guests disallowed).

Setting: TimeoutInterval=600
Usage: Seconds of inactivity before close files.

Setting: MaximumTimeoutUser=8
Usage: Highest user level to be timed out. Allowable range is 0-8.

Setting: MinimumTimeoutUser=0
Usage: Lowest user level to be timed out. Allowable range is 0-8.

Setting: PasswordExpirationInterval=182
Usage: Enter a number of days. 0 = no reminder/requirement.

Setting: AllowExpiredLogins=<u>YES</u>|NO
Usage: Set to YES to allow (N/A if no expiration).

Setting: InactivitySuspensionInterval=0
Usage: Set number to a period of days of inactivity before a user's account is suspended. 0=no such policy.

Setting: AllowCyclaLogin=<u>YES</u>|NO
Usage: Set to NO to disallow CYCLA logins.

Setting: InvalidUserIdRetries=4
Usage: Enter the number of retries. -1 = infinite.

Setting: InvalidPasswordRetries=2
Usage: Enter the number of retries. -1 = infinite.

Setting: CoadminEditIni=YES|<u>NO</u>
Usage: Set to YES to allow - not recommended.

Setting: CoadminCreateCoadmin=YES|<u>NO</u>
Usage: Set to YES to allow co-admins to create other co-admins - not recommended.

Setting: CoadminRestore=<u>YES</u>|NO
Usage: Set to YES to allow co-admins to restore from backups.

Setting: CoadminCreateCodeblck=<u>YES</u>|NO
Usage: [Future use.]

Setting: BackupMinimumUser=5
Usage: Lowest user level to make backups. Allowable range is 2-8.

Setting: CancelMinimumUser=0
Usage: Allow cancel to FoxPro if started from FoxPro.
                    Allowable range is 0-8.

In addition, there are three optional settings that may be placed in this section to direct the user groups that apply in certain circumstances. The setting names are **GuestGroup**, **CyclaGroup**, and **DefaultGroup**. These three settings affect the group ID of certain users as follows:

- If guest logins are allowed by the MaximumGuestLogins setting described above, then any guest is automatically assumed to be a member of a group entitled "Guest." As such a separate INI file section `[GuestGroup]` can be created with attributes to be associated with all guest users. This group name can be altered by using the GuestGroup setting. For example:

                    GuestGroup=Default

- If CYCLA logins are allowed by the AllowCyclaLogin setting described above, then someone logging as "CYCLA" is automatically assumed to be a member of a group entitled "Cycla." As such a separate INI file section `[CyclaGroup]` can be created with attributes to be associated with any CYCLA login. This group name can be altered by using the CyclaGroup setting.

- If a user has no group ID in their privilege record, the System checks for the existence of a "DefaultGroup" setting in the `[Security]` section. If found, the user will be assigned to the indicated group. Once again, any settings found in the applicable section (*e.g.,* `[DefaultGroup]`) would be applied to that user.

[Datasets]

The `[Datasets]` section allows for configuration of features associated with the multiple dataset capability. The settings include:

Setting: GuestDataset=Live
Usage: Force guest logins to a specific dataset.

Setting: SelectUponLogin=<u>YES</u>/NO
Usage: Determines if each user must select a dataset upon
                    login.

Note: If you create any settings for a dataset you must write them beneath the `[DATASETS]` section with the name of that dataset + "DATASET". For example:

```
[DATASETS]
[LIVEDATASET]
SelectUponLogin=YES
```

Setting: <GroupId>Dataset=<Dataset ID>
Usage: Force members of a specific user group to connect to
                    a specific dataset upon login. Example:
                    TraineeDataset=Training

Setting: ConnectionMessage=text|date|both|<u>none</u>
Usage: Set to NONE to turn the feature off (default). Set to DATE
                    to show the user the date/time of last change upon
                    connection.   Set to TEXT to show the user a custom
                    message for that dataset, if one exists. Set to BOTH to
                    show the user a combined message of date + text.

This feature allows the System Administrator to enter a message for each
dataset that the user sees upon login.   There are two aspects to the
message:

• Date/time any data was last changed in the dataset, and
• SA-specified "message of the day" for the dataset.

To create a message for a dataset, first make sure you have an `INI` file
Section with the name [<dataset>Dataset], such as [LiveDataset] and then
add something like:

```
[LiveDataset]
```

MessageNo=1
; increment the message # when you change the message

Message=You have entered the "live" dataset.
Message=This is where the current data is housed and data entry
takes place.
; handle long messages with multiple lines, as above

Setting: `[LiveDataset]`
                    Base Fiscal year=2000
Usage: This sets the base fiscal year to 2000 regardless of the
                    actual FY.

[SpellChecking]

The `[SpellChecking]` section allows for system-specified spell
checking preferences. On most systems some of these are overridden by
user-specific settings. The settings are:

Setting: CheckingEnabled=<u>YES</u>|NO
Usage: Globally turn off spell checking feature.

Setting: IgnoreWordsWithNumbers=<u>YES</u>|NO
Usage: Determines whether words with embedded digits are
                    spell checked. If set to "YES", any word containing one

or more digits is ignored (*i.e,* automatically accepted as is). Overrides any individual user preference set by the USERPREF.SPELLNUMS flag.

Setting: IgnoreUnusualCapitalization=<u>YES</u>|NO
Usage: Determines whether words with capital letters anywhere but in the first position are spell checked. If set to "YES", any word containing unusual capitalization is ignored (*i.e,* automatically accepted as is). Overrides any individual user preference set by the USERPREF.SPELLCAPS flag.

Setting: DetectRepeatedWords=<u>YES</u>|NO
Usage: Flag for catching double words. If set to "YES" and two consecutive identical words are found in the same sentence (other than "that", "has", and "had"), the user is prompted as to whether one of the words should be deleted.

Setting: InitialSuggestionLevel=<0-99> (default is 20)
Usage: Determines the number of suggestion creation schemes that are tried once a misspelled (or unlisted) word is found before the user is prompted for an action. Lower settings provide a faster interface but fewer initial suggestions. Higher settings incorporate a larger set of suggestions before the user is prompted. The **More...** button is always available to trigger the remainder of the suggestion creation schemes for any given word. The default setting of 20 includes all generally useful schemes while deferring lower priority schemes that provide longer lists of less accurate suggestions.

Setting: AddWordMinimumUser=2
Usage: Who can add words to dictionary. The allowable range is 2-8.

[ExceptionReport]

The [ExceptionReport] section allows for selected disabling of the Exception Report, or some of its individual rules. A summary of the settings is:

Setting: UserRules=<u>YES</u>|NO
Usage: Combine UDRULE table, if present, with DDRULE.

Setting: ReportMinimumUser=6
Usage: Who can run report (9 =nobody). The allowable range is 0-9.

Setting: Skip<Alias>Rule=<Rule Number>
Usage: Bypass indicated rule for given alias. Include one line in the INI file for each rule to skip.

[Integrity]

The [Integrity] Section allows for customization of certain data integrity features. In only rare cases should these be altered. The settings are:

Setting: AutomaticRecalculation=<u>YES</u>|NO|ASK
Usage: Determine system behavior following automatic revision update.

Setting: TransactionLogging=<u>NO</u>|YES
Usage: Set to YES to enable this powerful feature.

Setting: LogMemoChanges=<u>YES</u>|NO
Usage: Memo field changes are logged too (N/A if TransactionLogging=NO).

Setting: RecycleDeletedRecords =<u>NO</u>|YES
Usage: Set to YES to re-use deleted records (generally not recommended; instead, periodically pack the database).

Setting: BackupReminderInterval=7
Usage: -1 for no reminder. Default = 7 days.

Setting: ErrorHandling=<u>YES</u>|NO
Usage: Set to NO to turn off error handler (only if so advised).

Setting: ReportErrorHandling=<u>NO</u>|YES
Usage: Set to NO to disable separate printing-specific error handler.

Setting: LoginList=YES|<u>NO</u>
Usage: Specifying this will create a LOGIN.DBF in the main application directory (required since Guest users need write access to it). The file maintains User ID, Login Date and Time, Dataset, Platform, and Logout Date and Time. If a user *Does Not* logout properly (crash, re-boot, Panic Abort), the next time they login the previous login record is permanently stamped to show the improper exit (Login.NoLogout = .T.). Subsequent SA-level logins result in a message to the SA about the situation.

Setting: FlushLevel=<u>0</u>|1|2
Usage: This option should only be used if users/systems are experiencing memory conflicts and/or data loss problems. It is experimental and not expected to help in most cases.

Setting: ReplaceTabsWithSpaces=<u>YES</u>|No
Usage: Affects Re-Format function.

[DataTracking]

The `[DataTracking]` section is only required when the Data Tracking historical field value archiving feature is in use. This feature is described in the Transaction Logging and Data Tracking section of this Guide.   To enable the feature, include the line:

```
[DataTracking]
TrackChanges=YES
TrackField=STATUS
TrackField=MANAGER
…………
```

[Custom]

Settings in this section apply to this application only.

Setting: EscalationStartYear=2003

Setting: LastExportDirectory=C:\ESHPLAN\TEMP

User Group Sections

If desired, users can be classified into groups for ease of administration. Group names are up to ten characters and are entered into the "Group ID" field of the User Privileges window. Once a user belongs to a group, the System checks for the existence of settings in a `[<Group_Name>Group]` section of the `INI` file. If a user belongs to a group with an ID of "`DIRECTORS`" the System looks for settings in an `INI` section of `[DirectorsGroup]`.

There are a few Common settings that are currently checked for a user group. This list will expand greatly in future revisions. In addition, each system should have its own settings that apply. The following settings apply now or are intended for the future:

- **`ManagersMenu=YES`** will cause the *addition* of any new user to this group to have an initial user preference of having the Manager's menu turned on upon system login. (The user, of course, can subsequently change this preference.)

- **`AccessLevel=<0-7>`** will cause all members of a group to have the same access level irrespective of any attempt to set individual access levels in a user privilege record. *Not recommended.*

- **`<SpecialFunctionName>=YES|NO`** will allow for application-specific special functions to be specified at the group level and will

override any user privilege setting. An example might be:

```
EditFinancialData=NO
```

- **<OrganizationIDField>=<OrgCode>** will allow applications that categorize user privileges based on an organizational structure to specify that an entire group has a specific organization code. This would allow for an entire group affiliation to be changed via a single INI file change, rather than editing each user record. *Use with caution.*